RĪGAS EKONOMIKAS AUGSTSKOLA
STOCKHOLM SCHOOL OF ECONOMICS IN RIGA

WEBSITE AS A MARKETING AND DISTRIBUTION CHANNEL IN THE HOTEL INDUSTRY: THE CASE OF ESTONIA

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Acknowledgements

Abstract

This paper examines website development in the Estonian hotel industry and evaluates how effectively a hotel website is used as a marketing and distribution channel. The study is based on the methodology used by several previous researches: a checklist is created to analyze the richness of the websites and management perspective is obtained through questionnaires and in-depth interviews. Having evaluated 127 websites of Estonian hotels and 41 questionnaires as well as having interviewed several hotel managers, the authors find that the majority of hotels are not fully using the opportunities that the Internet provides. General trends show that hotels of bigger size, higher class, members of local or international chains, especially if they are located in Tallinn, tend to have websites that are richer in content and are more user-friendly. The management perspective reveals that hotel managers consider their websites to be an important strategic tool; however, there are still many deficiencies in website usage. Although many hotels are already on the right track in effectively using marketing and distribution functions of a website, still much has to be done to improve the current situation. The analysis made and the projections for the future of e-commerce help to draw conclusions and present suggestions for improvements that could lead to an overall increased level of performance.

1 Introduction

Marketing a service and marketing a product are inevitably different due to the particular characteristics of the two. Service marketing is considered to be a separate and distinct branch of marketing; its concept is complex and based on the recognition of the uniqueness of all services. Because of perishability, services cannot be stored and therefore, marketing has to be exact and timely. Though part of a service industry, the hospitality business is even more specific as market borders are difficult to define because of the international clientele.

The hospitality industry is inseparable from the tourism industry and the prosperity of hotels is strongly dependent on the number of tourists visiting a country. Tourism is very important for the Estonian economy as according to the Estonian Tourism Board it contributes around 8.2% to the country's GDP and provides a job for every ninth inhabitant. Moreover, the number of incoming tourists has almost tripled during the last 10 years and is increasing by around 12% with each year (Enterprise Estonia, 2005). The demand for hotels is growing as the number of overnight stays is rising steadily and as a result, more hotels are being established. However, the tourism and hotel industries are also interrelated in a reverse way: when Estonian hotels do marketing, they simultaneously advertise Estonia and promote tourism and travel to Estonia; thus good hotel marketing is essential.

As the Internet is becoming extremely widespread, the main distribution channels are working via the Internet: online booking systems and reservation systems such as Galileo and Amadeus. Moreover, the websites of many hotels are becoming both marketing and distribution channels as it is possible to get information about a hotel as well as book a room through a website. In fact, reservations made directly from the hotel website are rapidly increasing (Euromonitor, 2005). In order to attract more direct bookings, many of the leading hotel chains have recently made substantial investment in website development.

The marketing communication aspect of the website is equally important. Appropriate website attributes communicate the brand image and build long-term awareness. As audiences of prospects become increasingly expensive to reach through advertising, the tools of the Internet will become increasingly a media of choice, claims Fletch Waller (2002).

Realizing the importance of website development in hotel marketing, we would pose our research questions as follows: first, we would like to **investigate how effectively Estonian hotels use their website as a marketing and distribution channel;** second, we would like to

know **what are the viewpoints of managers on this topic,** and lastly discuss **what could be done to improve current practice.**

This study aims to analyse Estonian hotel websites and pinpoint their strengths and weaknesses. The findings of the study are relevant as they could help hotel managers to realize what are the attributes that their hotel's website is lacking and make the necessary improvements that could in turn lead to overall increased level of performance of the hotel.

In order to answer the research questions, the authors analyze the visible attributes of all Estonian hotel websites in the selected sample and gather additional information from the hotel managers. For the latter, both questionnaires and in-depth interviews are used to find out the details of the process behind developing and maintaining a website. Previous research and the best practices from around the world are used to evaluate the results from the Estonian market and to suggest improvements.

The outline of the paper is as follows: in the following section the theoretical background and previous research are presented. Section 3 gives an insight into the hotel industry, presenting evidence both from Estonia and around the world. Section 4 takes a look at the methodology of the study, describing the sample and data collection techniques used. The results obtained through the checklist and contacts with managers are described and analyzed in Section 5. Next, Section 6 answers our last research question and provides suggestions on what could be done to improve the current practice of hotel marketing via websites. Finally, the last section summarizes and concludes the paper.

2   Review of literature

2.1   From traditional communication channels to Internet marketing

The literature on marketing communication channels provides a wide variety of possible channels to use in developing the promotional mix for a product or service. According to Alastair M. Morrison, information and knowledge can be communicated to the customer using one of five promotional techniques: these include advertising, personal selling, sales promotions, PR & publicity, and merchandising (2002, 365). There are many ways for definite messages to be communicated to customers using different promotional techniques (see Appendix 1 for more elements of individual communication channels) and it is vital to choose the right promotional mix.

However, it should be mentioned that the costs incurred by using traditional communication channels (be it radio, newspaper or television) are rather high, and currently, with rapidly increasing development of interactive media, many companies have started focusing more on one of the most progressive marketing channels of today's world – the Internet (Kotler, Bowen and Makens, 2003, 736).

The development of Internet technologies has gradually changed the way business is done in the hospitality industry and how marketing strategies are designed. As Oenicke has put it, "in contrast to the traditional marketing monologue, Internet marketing offers a dialogue, a mutual exchange of information", which is very important for the hospitality industry as it sells services. Thus an interactive communication network that allows both parties to establish direct communication, is an ideal system for this industry (1996, 59-66). Marketing on the Internet allows one-to-one, one-to-many, and many-to-many communication, giving a chance for an individual hotel, a group of hotels, or a hotel chain to target at the same time an individual client, a group of clients, and the mass market as a whole.

Apart from establishing better interactive networks, Internet marketing via a website offers plenty of other advantages for the hotel industry (Bowie, David, and Francis Buttle, 2004):

- Elimination of intermediaries' commission, GDS (Global Distribution System) booking fee, and switch costs.
- Relatively limited capital investment needed to develop Internet websites, compared to the high cost of intermediary charges.
- The opportunity to provide high quality contemporary information on the web-site directly to customers (for example virtual room tours).
- A search, book, and confirmation capability 24 hours / 7 days a week.
- Internet as global marketing has no geographical restrictions, has international reach.

2.2 The way to effective Internet marketing

Although Internet is perhaps the best and most comprehensive marketing medium, it is not marketing all by itself and will not alone guarantee any success. In order to market online successfully, one must be a good marketer and know how to market the product or service as well as the website itself. Bowie, David, and Francis Buttle propose several tips on how to make

Internet marketing efficient and first of all create awareness of the existence of the website (2004, 195-228):

- Choose and register the most appropriate domain name.

- Promoting the website with traditional marketing media (indicate the web-site in advertisements, newspapers, leaflets, brochures, business cards, etc.).

- Having a good place in search engines and Internet directories (e.g., Google, Yahoo).

- Advertising on the web – placing banners on the websites of other firms.

- Forming alliances with other firms: creating hypertext links on websites of partners and other organisations.

Creating awareness of the website is definitely not enough: once the customers get to know about its existence, it is important to motivate them to return; therefore it is necessary to constantly update the website, making the site more interactive by running a simple newsletter, offer the customers special incentives to use the website: offer different contests, bonus programs (Levinson, 2005).

2.3 Previous Research: Analyzing the needs of customers and evaluating hospitality websites

A recent study of hospitality websites has shown that the contents of existing websites do not match consumer needs and about half of customers experience difficulties finding the necessary information on websites ("Online frustrations", 2004). This is a reality that has to be changed, as according to Jeong and Lambert, by understanding consumer needs and developing websites accordingly, hotel managers "can effectively perform direct marketing and mass customerisation" through their websites (qtd. in Law, Hom and Hsu, 2005).

The number of research papers examining the expectations and attitudes of customers to hotel websites is rather limited. One study suggests that people believed the websites had to be attractive, informative and interactive (Chu, 2001). Another study by Jeong *et al.* (2003) found that customers viewed the content and quality of the website as the most important factors. These are, however, rather general findings and can be differently interpreted.

In the most recent and comprehensive research carried out by Law, Hom and Hsu (2005), 304 travelers were interviewed to get customers' perspective on the importance of different hotel websites' attributes. The results of the study show that the most important dimensions for hotel website visitors were reservation and facilities information, room rates, basic contact and access

information (telephone, e-mail, address, transportation), visual representation of the hotel and rooms, and information in different languages due to increasing number of international visitors. The least important features, according to the respondents, were surrounding area information, frequent guest program, meeting facilities, and virtual tours.

Knowing customer expectations regarding hotel websites, the next step by a hotel manager would be to evaluate their homepage. Several studies have already tried to do this. In order to evaluate hospitality websites, in 1996 the Cornell Hotel and Restaurant Quarterly published a survey on hospitality websites and the features that could be found there (Murphy *et al*., 1996). 32 separate features were identified and then compiled in a checklist, which was used to observe and determine to what extent the hospitality companies are using the advantages provided by Internet marketing.. Based on their nature, the features were grouped into four categories: promotion and marketing, service and information, interactivity & technology, and management.

C.-S. Wan conducted a survey in order to evaluate the websites of international tourist hotels and wholesale tourist operators in Taiwan (2002). The model of evaluation used consisted of three categories: user interface, variety of information, and online reservation.

A similar study was conducted by Zafiropoulos, Vrana and Paschaloudius (2004). This research used a quantitative method of measurement and evaluation of the information provided by Greek hotel websites. The checklist created by these researchers is more advanced and the applied model combines seven data dimensions: facilities information, customer contact information, reservation-price information, surrounding area information, management of the website, company information and communication. The findings of this paper point out that Greek hotels use Internet potential only to a very small extent and give little information on the most important features – reservation and prices.

This research aims to create an integrated checklist based on previous research with the help of which the authors will count the applications on each of the hospitality websites surveyed in order to evaluate the websites and get an overall picture of the extent to which Estonian hotels use Internet marketing.

3 Trends in the Hotel Industry and E-commerce

As a result of increased possibilities to travel, hotel-keeping has become one of the largest industries in the world. Recently, the major positive growth factors have been the globalization of companies, consumers' increasing desire to travel, and the opening up of new markets

(Euromonitor, 2005). Moreover, as a result of online booking, travel has become relatively cheaper and easier.

As the competition is tight, new strategies are constantly being developed by hotels. Room facilities as well as additional services are getting more sophisticated, as the customer is becoming more demanding. Lately, the dominating trend in the hospitality business is the development of new, better targeted products.

Although traditional distribution channels still have the largest share of sales, Internet bookings are growing rapidly. According to Euromonitor, Internet sales are the highest in Canada and the US, 21.7% and 18.3% respectively (2005). In most countries, though, it has not reached a two-digit figure. Several years ago, such online travel sites as Hotels.com and Expedia started taking over a share of the off-line travel agencies' sales. Nevertheless, these discount websites take a large commission and do not allow the hotels direct control over the final prices. Therefore, hotels make efforts to lead customers from travel websites to a company-operated website.

In order to compete with the travel sites, hotels have started to offer the lowest price guarantee on their websites. In 2003, the largest French hotel chain Accor started displaying the best available prices and last minute promotions on their websites to motivate online bookings. In eight months, online bookings increased by 60% and the sales from the Accor website made up almost 85% of the total online reservations.

Euromonitor predicts a decline in package holidays, as travellers need more flexibility and therefore make more bookings through the Internet (2005). This promises an even greater growth in hotel e-commerce.

3.1 The Estonian Hotel Market

According to the Euromonitor report, Eastern Europe was the second fastest-growing region in international arrivals in 2004 (2005). Estonia, amongst others, has benefited from investment in its tourism infrastructure and the emergence of low-cost airlines. During the period 1999-2004, the number of tourists went up 87% in Estonia, making it the 15th growth market in the world.

In September 2005, there were nearly 14 000 rooms in the Estonian hospitality industry (Estonian Hotel and Restaurant Association, 2005) with new accommodation establishments

opening up nearly every month. Most tourists still come from Finland, but the relative share has decreased (Estonian Statistical Bureau, 2005).

As the Estonian government invests around 10 million Euro a year for the development of tourism and Estonia is becoming more known around the world, the growth in this industry probably will continue to grow.

Besides all the other types of accommodation, there are 137 hotels in Estonia, ranging from small family hotels to large 400-room chain-operated properties. Most tourists come to Estonia with group holiday packages organized by travel agencies. Although such group bookings are usually a part of a longer term cooperation between the agency and the hotel and do not include online transactions, all Estonian hotels have a website. That fact is an important basis for this paper, as the authors can assume that the hotel website is recognized as a tool by Estonian hotels.

The hotel industry is developing very fast in Estonia and therefore, by the time this paper is ready, there are probably more hotels and more websites in Estonia than in this paper's sample.

4 Methodology

4.1 Sample

In this paper, all Estonian hotels that have a website have been studied. Other types of accommodation companies such as hostels and guest houses were eliminated from the sample. When dealing with chain hotels, the website was analyzed only once, as most chains have a common site with separate sections for each hotel. Since the sections are often created and developed by the same person in charge, the final result would have been biased if the sections had been analyzed independently.

In total there were 137 hotels in the sample, though when accounting for chain websites, it was estimated that a total of 130 websites had to be analyzed; however, during the research it turned out that 3 hotel websites were not functioning (Kristiine, Maritime, and Minister), therefore, a final sample of 127 hotel websites was analyzed.

4.2 Data collection

Data collection consisted roughly of three parts. Firstly, all the websites of Estonian hotels were visited and analyzed according to the developed checklist model. At the same time, questionnaires were sent to all the hotels to gather information from the managers' perspective.

To get more in-depth information, four interviews were conducted to cover broader discussion topics.

4.2.1 Website visits

All the 127 websites were visited once at an unspecified time. The time of the visit should not be a concern, as the website must be at its best at any point of time.

The checklist developed by Zafiropoulos, Vrana and Paschaloudius in 2004 was taken as a basis for website evaluation. The main aim of the checklist that describes information features of the hotel websites was to measure the overall volume of information offered and see to what extent hotels adopt Internet strategies to get the most of their websites. However, the authors have modified the model so that it could better fit their research. In essence, the final model in use aimed to evaluate the website of a hotel without measuring the value of the property's location or service quality of the hotel. Therefore, features that could create such a bias have been eliminated. For example, information about the shopping possibilities near the hotel can only be given by hotels in certain locations. Therefore, this should not be a separate feature of the website, but should be included in the "area interests" section of the website. Moreover, aspects that were not relevant for an ordinary customer, such as franchise opportunities and job offers, were excluded from the list. Hence, the checklist evaluates Estonian hotel websites from the perspective of a potential customer. In addition, the authors have slightly restructured the previous checklist to allow conclusions to be made in a manner more appropriate for this paper. The checklist (Appendix 2) included the following sections:

company and facilities' information, surrounding area information, contact, reservation and price information, management of the website, communication.

In order to gather the necessary data about the features represented in hotel websites, an Excel spreadsheet was created which included all 127 websites that were observed under 48 different features of the checklist representing the six different sections described above. Apart from that, the location of the hotel, the number of rooms and each hotels' URL were included in the spreadsheet. All hotels were checked for the availability of each feature, and in case the website possessed a particular feature '1' was assigned and if not, then '0' was assigned, which afterwards enabled the authors to make summarizing statistics in respect of the overall number of hotels whose website possessed each particular feature, as well as the number of features each hotel had.

4.2.2 Questionnaire

By sending the questionnaires to all the hotels in the sample, the authors wished to gather information about the development and current use of hotel websites. The questions were developed by the authors themselves but the theoretical framework was of course taken into account. The questions are divided into different sections to address the various aspects of website attributes (Appendix 3): *general information about the respondent and the hotel, creation of the website, regular activities, results, attitudes.*

The questionnaires were sent in electronic form to the Marketing department with a request that they be forwarded to another person in charge, if necessary.

The response rate was 32% (a total of 41 replies), which is a considerably high percentage for an e-mail questionnaire. Although some managers left a few questions unanswered, incomplete questionnaires were not eliminated from the sample because the questions are not interdependent.

Out of the total of 41 questionnaires, 23 were answered by the Marketing or Sales Manager, 13 by the General Manager, and the rest by people holding other positions. 19 questionnaires were answered by hotel managers from Tallinn and 22 from elsewhere. Later in the analysis of the fieldwork, the authors discuss the difference in results for the hotels in the capital city.

4.2.3 Interviews

The aim of the interviews was to get in-depth information about the process and evaluation of web-site performance from Estonian hotel managers as well as to put the website in perspective with the overall marketing plan of the company. The interviews were a continuation of the topics covered in the questionnaires and helped the authors make qualitative conclusions from the study. Although a certain sequence of questions was followed during the interviews, the authors tried to leave the discussion fairly open in order to discover new aspects of the study by letting the managers speak.

The following issues were the basis of the interviews (see Appendix 4 for more details): *general information about the hotel, marketing activities of the hotel, sales activities of the hotel, hotel website.*

Four interviews were conducted: 3 in Tallinn and 1 in Tartu. Two interviews were held with a sales manager, one with a marketing manager, and one with a general manager, to avoid bias of the position held by the interviewee. Each interview lasted for approximately 60 minutes and the

authors took detailed notes of the discussion. The results, combined with the questionnaire answers, are analysed in the Management Perspective part of the paper.

5   Empirical findings and analysis

This section describes the findings made after the research was completed and discusses the questions posed in the research question. The structure of this part is similar to the structure of the methodology: first the results and discussion of the checklist are presented and afterwards findings from the questionnaires and the interviews are brought up.

## 5.1   Analysis of checklist results

Analysis of the checklist results is presented in the following way. First, the discussion of overall statistics for all Estonian hotels without taking into consideration location, size, or any other factors is laid out. Afterwards, the location factor is taken into account and the statistics for the hotels located in Tallinn are compared to the overall results for the whole Estonian hotel industry. Thereafter, the importance of other factors such as size, class, and chain membership are brought up. Lastly, discussion of the results obtained with the help of the checklist is presented.

5.1.1   Richness of Estonian hotel websites

According to Sigala, richness is an important feature of the virtual marketplace, as it is "the depth and the detail" of information that can be both given to the customers or collected from them (2003). We are going to observe to what extent Estonian hotels use the six data dimensions that were evaluated with the help of the checklist and describe each of them in a more detail.

5.1.1.1 Company and facilities information

It is important for a hotel website to possess the features *'company and facilities information'* as they help a customer to get acquainted with the hotel and obtain an idea of what is offered in the hotel and what expectations a person can form.

**Chart 1.** *Company and facilities' information.*
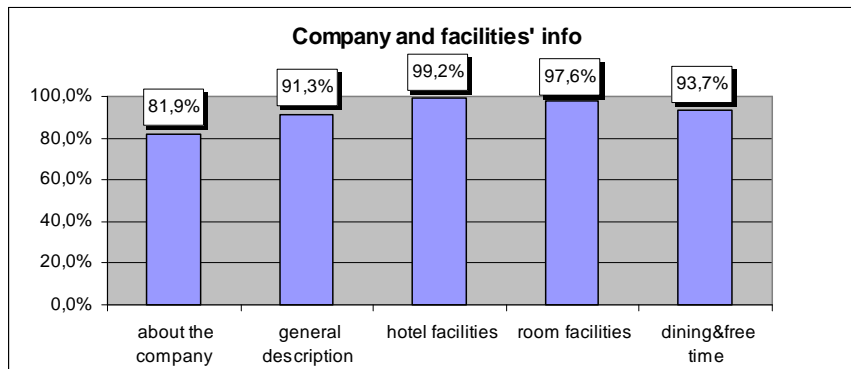
Source: Created by authors.

Chart 1 shows the percentage of Estonian hotels that use different features to describe their company and hotel facilities information on their websites. According to the graph, the majority of the hotels give information on all five features.

Although the percentage of hotels using different features of this dimension is rather high and even higher than in the sample of Greek hotels studied in 2004 by Zafiropoulos, Vrana and Paschaloudius, still the availability and quality of these features will be one of the first factors that create an overall impression about the hotel; thus, every hotel should have them.

5.1.1.2 Surrounding area information

Surrounding area information is needed to provide clients with information about the location of the hotel and help find it, present the surroundings and places worth visiting.

Chart 2. *Surrounding area information.*
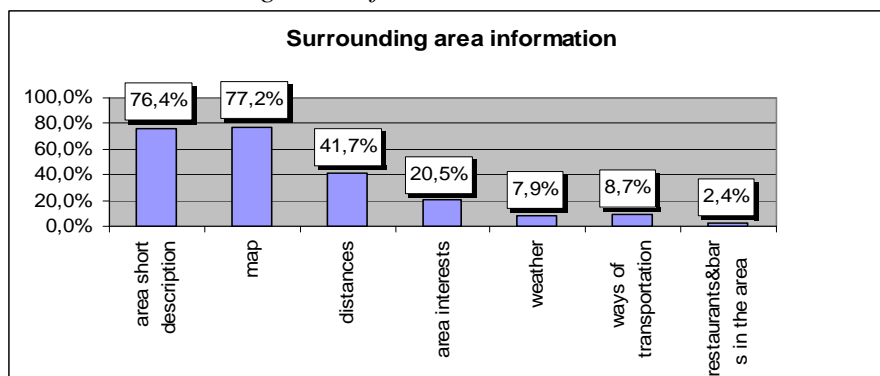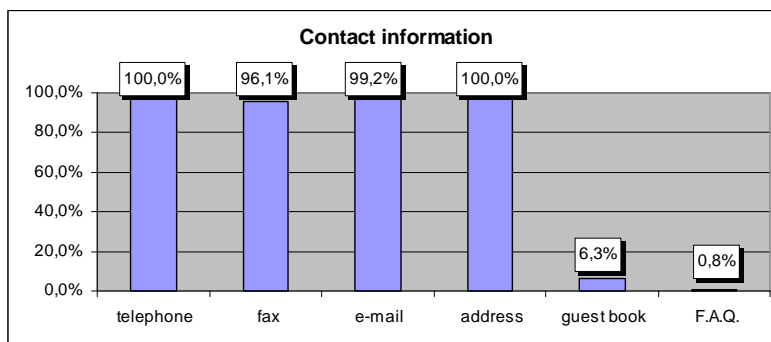

Source: Created by authors

Chart 2 shows that surrounding area information is represented in the Estonian hotel websites to a much smaller extent than the previous dimension. What is rather surprising is that

very few hotels provide clients with information about eating places and bars in the area (2,4%). The uncommonness of this feature might be explained by the unwillingness of hotels to create competition with restaurants that are usually a part of the hotel. Also, the small percentage of hotels whose websites give information on transport that has to be taken to get to the hotel can be explained by the fact that an average customer would take a taxi to get to the hotel.

5.1.1.3 Customer contact information

Customer contact information allows clients to contact the hotel at any time to get the necessary information, make a reservation, or find the location of the hotel, as well as to ask any questions that they might have.

Chart 3. *Contact information.*

Source: Created by authors

Chart 3 summarises the importance of contact information as seen by the hotels. In fact, an extremely small number of hotels are using a guestbook; however, this could be rather useful, as it can serve two very important functions. a guest book is a place where customers can leave their comments; therefore, a guestbook can serve as a feedback form and could later be analyzed by managers to make improvements in the hotel. Moreover, positive comments about the hotel left in the guestbook could serve as a good marketing tool and attract new clients.

5.1.1.4 Reservation-price information

Reservation – price information is an extremely important dimension, as the possibility to reserve a hotel via a website is an important feature and plays a significant role in the distribution system, as it eliminates intermediaries' fees. Many hotels have already employed this feature on

their website; many are still planning to do it. Price information and special offers are also important attributes as they are determinant factors that help clients to make a choice.

**Chart 4.** *Reservation-price information.*
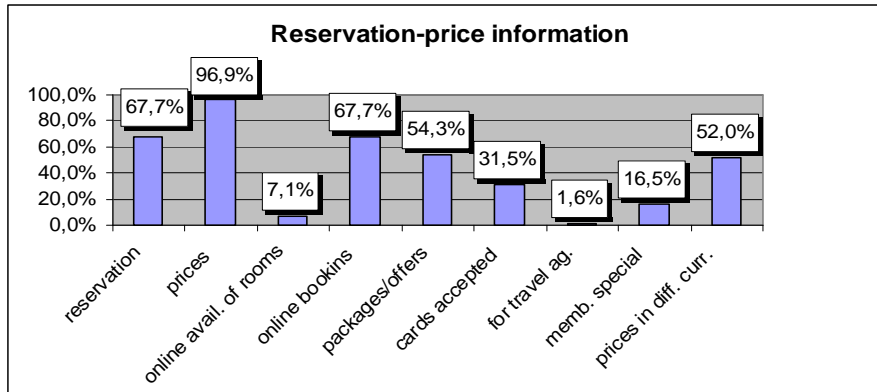
As for the availability of these features on the websites of Estonian hotels, then 67,7% have already installed reservation possibility via their website, which is already quite a high number and is expected to rapidly increase in the future.

Prices are displayed by 96.9% of the hotels; however, only 52% show prices both in EEK and in Euro. The hotels should take into consideration that the majority of tourists come from abroad and would appreciate it if prices were expressed not solely in the local currency. Information about accepted cards is given in 31,5% of hotel websites, though more hotels should use this, as it is an inexpensive thing to do which can eliminate many inconveniences that could be observed if it afterwards turned out that the client's card was not accepted.

5.1.1.5 Management of the website

Management of the website includes both very important features (photos, selection of languages), as well as features that are not of prime importance but that could add much to make the website more interesting and provide additional information.

Chart 5. *Management of the website.*

Management of the website
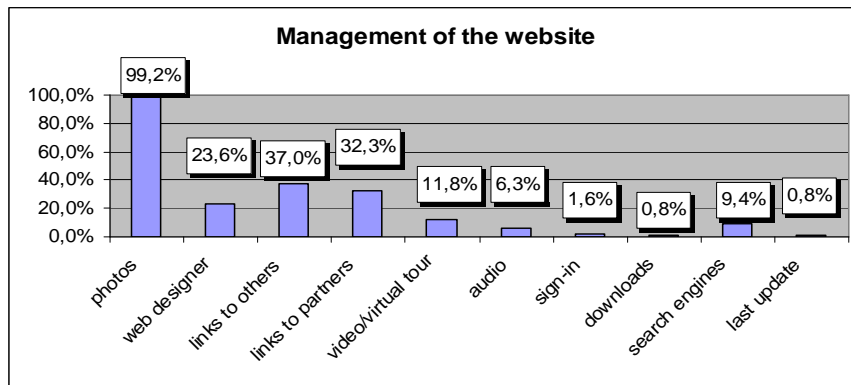
Source: Created by authors.

Chart 5 shows that almost all (99.2%) of hotels have a variety of photos on their website, which is understandable as photos represent the product itself (the hotel building, rooms, restaurant, etc.) and are very important for the client to decide whether he or she is willing to stay in the hotel. Other features of this dimension are represented to a much smaller extent. For example, it was possible to find links to partners in just 32.3% of websites. This is a category that needs some attention, as according to the theories described above, making alliances and creating hyperlinks to partners is a cheap and effective marketing tool.

Another important feature that was explored under the management of the website was the multilingualism of hotel websites; Table 1 describes the findings regarding this category.

**Table 1.** *Variety of languages used in hotel websites.*

Languages	English	Finnish	Swedish	German	Russian
	93,7%	70,9%	9,4%	28,3%	59,8%
Out of 127	119	90	12	36	76

Source: Created by authors.

Apart from the Estonian language, the presence of five languages was explored: English, Finnish, Swedish, German, and Russian, as the majority of tourists belong to countries where these languages are spoken. Apart from that, the Latvian, Lithuanian, and French were represented in a few hotels.

5.1.1.6 Communication

Effective communication with the client can be achieved by having two-way communication: providing the clients with all the information about the hotel and all the news that is happening, as well as receiving feedback from them.

Chart 6. *Communication.*
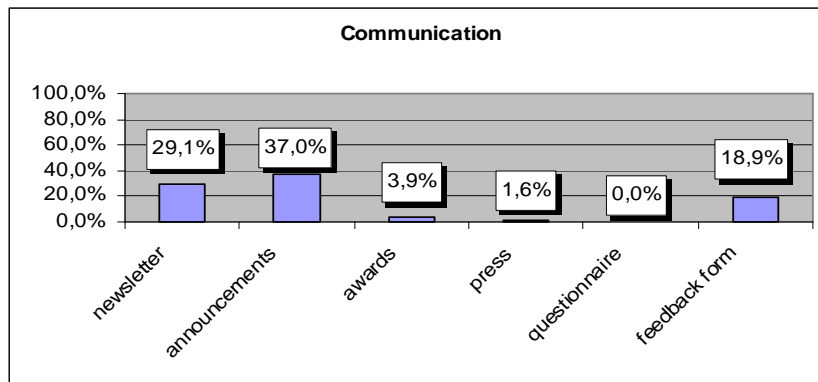
Source: Created by authors.

Chart 6 shows that very few hotels use their website as a communication tool. Not a single hotel has a questionnaire for clients on the website, and only 18.9% are using the feedback form, which is a rather small number. Customer feedback is an important item that can help the hotel better meet customer expectations, which would lead to improved customer satisfaction and overall improved operations; thus more hotels should consider adding this feature.

5.1.2 Comparison of results for Estonia and Tallinn

In this section the location factor is taken into account while evaluating the results and the overall results for Estonia that were described in the previous part are compared to the results gathered separately from the websites of Tallinn hotels. The research has shown that generally the hotels located in Tallinn have better results and a bigger number of hotel websites possess the features that were analyzed. The reason for that might be the fact that Tallinn is the main tourist destination, thus hotels there tend to make their websites as attractive as possible. Moreover, Tallinn has the largest number of hotels in comparison to other parts of Estonia (57 out of 137 are located in Tallinn).

Again, the sample was adjusted for chain websites, while hotels with non-functioning websites were drawn out of the sample, leaving a sample of 43 hotels located in Tallinn.

Appendix 5 shows a comparison of the occurrence of all 48 features in all Estonian hotels and separately in Tallinn hotels. Already from the first glance at the table it can be seen that on average more hotels in Tallinn possess each separate feature than Estonian hotels overall. Out of 48 features only nine of them (about the company, area interests, restaurants and bars in the area, the Swedish and German languages, web designer, downloads, last update, and press) are

represented by fewer Tallinn hotels than Estonian hotels overall, while the other 39 features appear in Tallinn hotel websites more often or as much as in all Estonian hotels in general. It is worth mentioning that the hotels located in Tallinn fully predominate in the dimension 'reservation-price information', forming a big difference in occurrence in comparison to all els in Estonia. Moreover, as Table 2 shows, the average number of features found in Tallinn hotels is higher than the average number of features in Estonian hotels: 22,76 (47,4% of all) versus 20,72 (43,2% of all). Also, the hotel with the most website features is located in Tallinn - maximum features for Estonia is represented by the Tallinn hotel The Three Sisters. Furthermore; the hotel that has only eight website features is located outside Tallinn, while the worst performing website of a Tallinn hotel has 13 features.

Table 2. *Comparison of statistics gathered for Tallinn and Estonia*

	Minimum	*Average*	*Maximum*
Tallinn	13 (27,1%)	22,76 (47%)	32 (66,7%)
Estonia	8 (16,7%)	20,72 (43,2%)	32 (66,7%)

Source: created by authors

This data shows that hotels in Tallinn tend to have websites richer in content than Estonian hotels in general, meaning that they try harder to use the opportunities that a good website can provide.

5.1.3 The effects of other factors: size, class, and chain membership

The research by Zafiropoulos, Vrana and Paschaloudius, found out that "…hotel class, size and chain membership are positively correlated with the amount of the information offered through the hotel websites" (2004). It is claimed that a bigger of hotel gives an advantage in terms of financial resources and technical expertise. However, we would not account for the size factor only, as in many cases small hotels of a good class have much better websites than bigger hotels of a lower class; moreover, chain membership provides a big advantage.

Appendix 6 gives information on the number of features and the percentage of the overall features that each separate hotel in Estonia possesses on its website. The table shows that indeed, chain hotels have a number of features over the average (which is 20,71 for Estonian hotels): Reval Hotelgroup – 30, Domina -26, Nordic Hotels – 25, and Scandic Hotels – 22. The class of hotel also matters considerably: The Three Sisters Hotel has the biggest number of features among all Estonian hotels – 32. This hotel has only 23 rooms; however it is the only hotel in Estonia which is a member of Design Hotels™, which shows it is a higher-class hotel, and it has

a good explanation why this hotel turned out to be the 'winner' in the category of hotels that possess the most features on their websites. It can also be observed that the websites of larger hotels, especially those of higher class or belonging to chains, have a relatively large number of features: for example, the Meriton Grand Hotel – 31 features, Best Western Hotel Pärnu – 30, Metropool - 27, Pühajärve Puhkekeskus – 25, and others.

The results show that size, belonging to a chain, and class of hotel have an impact on the quality and content of the hotel's website; however in this paper this is not analyzed in detail and could be a good topic for further research.

5.1.4 General comments on checklist findings

The description of the results of the checklist presented above shows that many hotels have already understood the importance of their website as a marketing and distribution tool; however, much still has to be done in order to use Internet opportunities effectively. As to general trends, bigger hotels of higher class and those that are members of hotel chains, especially those located in Tallinn, tend to have better websites. Despite that, there is still much to be improved, and unfortunately, none of Estonia's hotels has a website on a level close to the best world examples. For example, one of the world's most famous hotel chains Marriott (2006) has 79,2% of the features in our checklist, and the famous French hotel chain Accor Hotels (2006) – 72,9%. At the same time, the Estonian hotel with the most website attributes – Kolm Õde – has 66,7% of the features, which is pretty close, though it is the best and rare example, while the majority of websites possess under 50% of the features in the checklist.

Although only around half of the features appear on hotels' websites, this is not the determinant of the effectiveness of the use of marketing and distribution via a website. As previous research papers have shown, some attributes are regarded by Internet users as very important, while by others as less or not important at all; therefore, this fact has to be taken into account when making any judgements.

As the results of the study by Law, Hom and Hsu have shown, hotel website visitors regard reservation and facilities information, room rates, contact information, and visuals as the most important attributes (2005). At the same time, surrounding area information, virtual tours, management of the website and a frequent guest program are regarded as the least important. Indeed, if we once again return to the results of the checklist, it appears that the features the customers find out to be unimportant, very rarely appear on Estonian hotel websites. At the same

time, important dimensions such as contact and facilities information, and features such as room rates and visuals are very frequently used. However, it is possible to reserve a room online only in 67,7% of the hotels, which is a rather small number and more hotels should use this function, as online reservation plays a very important role of a "direct online sales channel with the lowest distribution cost" (Law, Hom and Hsu, 2005). Moreover, the function of communication is not effectively used by Estonian hotels: very few hotels post the news (29,1%) and only 18,9% use their website as a two-way communication channel by collecting feedback from customers. Furthermore, a small number of hotels use a cheap and effective Internet marketing tool – making alliances and creating hyperlinks with partners (32,3%).

The results of the checklist have shown that many deficiencies exist in Estonian hotel websites; however, before making any conclusions, managers' perspective on the topic should be observed.

5.2 The Management Perspective

This section of the paper discusses the results of the questionnaires and interviews to find out issues about Estonian hotel website development and management that cannot be discovered by merely visiting the website. Moreover, it will give information about the attitudes of the managers about the websites of their companies (Appendix 7). All the completed questionnaires are combined to see the overall results for Estonia. Nevertheless, as Tallinn is in many ways different from other locations, it is essential to analyze its effect on the whole industry. Although 19 questionnaires from Tallinn are not enough to make a separate statistical analysis, the authors try to observe how the answers from the managers in Tallinn influence the overall results.

5.2.1 Creation and Development of the Website

- Most Estonian hotel website concepts have been worked out by the management team, without including an IT or web-design company. The authors of the paper find that it is not a good practice, as professional IT advice could lead to more effective solutions.
- 34 out of 39 hotel websites were created not taking a foreign hotel website as an example. In Tallinn, relatively more respondents said that a foreign homepage was examined to get ideas.
- The target group for websites is mainly individual clients. In locations outside Tallinn, domestic clients are almost as important a target group as foreigners (Table 3).

Table 3. *Hotel websites' target groups (1(the most important) - 4(the least important)).*

Target group	Estonia	Tallinn	Tallinn Centre
Estonian travel agencies	3.05	3.09	3.40
Foreign travel agencies	2.96	2.88	3.03
Domestic individual clients	2.04	2.63	2.57
Foreign individual clients	1.97	1.70	1.37

Source: Created by authors.

- Managers rated contact information, information about the rooms/facilities and the existence of photos as the most important features. Online reservation was rated relatively more important for hotels in Tallinn.

- On the scale 1-5, information about the weather received an average of 2.32 points. The authors would advise using links to other websites (e.g., weather, tourist information) as an extension of the hotel's own homepage.

- According to Andres Huul, Manager of Vana Wiru hotel in Tallinn, managers are sometimes afraid to put too much information on the website, in order not to confuse the visitor (interview, 2006). Nevertheless, popular sites such as Marriott.com (Marriott, 2006) show that good structure can hold a lot of information in a user-friendly format.

- The answers show that updates are mostly done monthly; however, in many cases, only quarterly or yearly. In Tallinn, the situation is better, as 8 out of 19 respondents claimed to make changes all the time.

- The most frequent update is putting up a new offer/promotion (an average of 1.43) but in Tallinn, the news section is changed more often than promotions (See Appendix 7, part 3).

5.2.1.1 Creating Traffic

- In order to create awareness and traffic, some basic issues have to be covered: an appropriate domain name; a good place in search engines; promotion of the website via traditional and Internet marketing; alliances with partners (Bowie, 2004).

- The domain names are mostly well chosen but most hits in search engines are still online travel agencies and discount sites. Reval Group, for example, is using professional services to optimize the website and to be better found in search engines (interview, 2006) but Reval is one of the few to do so.

- To promote the website, traditional advertising is mainly used (an average of 1.91). Advertising on the Internet is also quite common (average 2.01) but using hyperlinks and banners is surprisingly unpopular.

5.2.2 Website as a Marketing Channel

- Most popular marketing activities are marketing through print media, brochures, and professional fairs.

- Smaller hotels often have to rely on symbiotic marketing (e.g. with the regional tourist bureau). Triinu Akkermann, the Marketing and Sales Manager in Hotell Tartu, claimed that many hotels in Tartu region cooperate in marketing activities (interview, 2006)

- A slight majority of managers believed marketing to be the main function of a website.

- Managers admit that a website is often more reliable, as brochures might not reach the final customer through an agency.

- Kaire Rikka from Nordic Hotels pointed out that there is nothing special about their website and that is a strong minus (interview, 2005). Foreign trends show that hotel websites are becoming representative of the uniqueness of the hotel itself (e.g. the Bulgari website (2005)).

- The questionnaire revealed that possibilities such as online feedback or question forms are relatively unimportant for managers (Appendix 7, part 5).

- Feedback received is often not analyzed properly. This may seriously hold back two-way communication and therefore harm the effectiveness of the website as a marketing channel.

5.2.3 Website as a Distribution Channel

- Depending on the features of the hotel, reservations through the hotel website make up to 10% of total sales, mostly much less.

- As found out from one of the interviews, hotels are often already totally booked for groups and individual clients are not even able to book from the site. Therefore, the number of inquiries through the website is larger than the final online sales.

- Many managers admit that sales through the website are relatively profitable for the hotel because no commission has to be paid.

- All four interviewees claimed that they offer a discount (or free breakfast in the case of Nordic Hotels) to motivate customers to book on their website.

5.2.4 Analyzing Effectiveness

- Half the respondents claim that they do not measure the effectiveness of their homepage.

- The hotels that measure results usually observe the number of website visitors and reservations coming from the site. A common practice is to see the increase in online booking after a certain Internet offer.

- Many respondents claimed that they do not want to change anything about their website.

6 Future Projections and Suggestions

After analyzing both the checklist results as well as the management perspective, the authors would like to give suggestions for improving the current situation of hotel websites in Estonia. The advice is based on the theoretical material and predicted future developments in this field.

One of the potential threats to weaker hotels is that the current high growth in tourism could stabilize in the future and the number of hotels may rise to saturation level. Moreover, when taking into account the movement from group to individual travel pointed out by Euromonitor, managers should definitely not underestimate the role of e-commerce (2005).

As mentioned before, the reservation system is an essential feature that all hotel websites should possess. Nevertheless, in his book "Does IT matter?" (2004), Nicholas G. Carr claims that having a good IT system cannot give a company a competitive advantage because any system is very easily replicated. Therefore, as hotel websites continue to advance, having an excellent booking system will no longer be an advantage to a hotel, as all the hotels will have technically appropriate and user-friendly sites. Hence, the distribution factor will not create a competitive edge, whereas the marketing aspect continues to be important. Lack of uniqueness is one of the major drawbacks of today's Estonian hotel websites and the authors strongly recommend thinking about how to make the company's homepage more attractive and differentiated.

The most general suggestion is that hotel managers should exploit the opportunities offered by the Internet to the fullest. This process starts even during creation of the website. We advise using professional IT services and consultation not only for the technical part of the process, but also for developing the concept in order not to exclude some possible solutions.

Concerning the amount of information provided by Estonian hotel websites, there is definitely room for improvement. According to Law *et al.*, not only basic contact information but additional facts about transportation and distances are important for the client (2005). Also, the possibility to print out a map of the area and contacts of the hotel to feel psychologically safe is

preferred by users. It is also important to emphasize that implementing these suggestions takes very little resources. Another inexpensive way to make the website more effective is to create alliances with co-operation partners. This is essential for increasing the traffic on the site.

Some larger changes that would take more resources but would be strongly recommended by the authors would include adding languages and some more advanced features to the website. To attract more nationalities, two languages are definitely not enough. Concerning the more advanced attributes, such as audio features and virtual tours, having these is of course not essential but would give the website positive distinctiveness.

One of the most important points the authors would like to make is that more regular work should be done to manage and develop the website. Websites should be updated more often to keep the information fresh and even more importantly, performance and results should be analyzed in order to make some sound conclusions how to be more effective. Moreover, making the website work better as a two-way communication channel could improve user satisfaction as well as giving managers some ideas about how to make the website more user-friendly.

7 Conclusion

The aim of this research was to identify to what extent hotels in Estonia use their websites as a marketing and distribution channel. To achieve this, we created a checklist containing six dimensions that explain the richness of a website and analyzed 127 hotel websites in accordance with these dimensions, as well as gained the viewpoints of managers on this topic. In line with the authors' expectations, the results obtained show that much has to be done in order to achieve the level of global best practice.

The results of the checklist help to answer our first research question - *how effectively the Estonian hotels use their website as a marketing and distribution channel*. The findings show that on average websites are used rather ineffectively by the hotel management; however, the difference in performance of the best and the worst hotel websites is rather substantial. This is explained by such factors as location, size, class, and chain membership. Taking into account these factors, it was found out that hotels located in Tallinn tend to have websites richer in content and possessing more features from the checklist. Moreover, bigger hotels, especially those belonging to local or international chains, turned out to have better websites. Furthermore, the class of a hotel matters much: the higher the class, the more effort the managers are putting into developing an outstanding website, even if the hotel is small (e.g. The Three Sisters Hotel).

According to the checklist results, the features that are regarded as rather unimportant by consumers (e.g., virtual tour, surrounding area information) appear on websites rather seldom, while more hotels try to place important website features such as contact and facilities information, prices, reservation information. The majority of Estonian hotels use their websites as a marketing tool by inserting pictures and trying to show the hotel at its best, providing relevant and necessary information and in such a way attracting customers; however, not many hotels use such an effective marketing tool as forming alliances and creating hyperlinks with partners. As for the role of a website as a distribution channel, many hotels have already realized the importance of functioning online reservation systems. Still, only 67,7% of hotels provide their clients an opportunity to reserve a room online, while ideally all hotels should possess this feature if they do not want to lose an advantage. Another important aspect is that only 18,9% of hotels have feedback forms and thereby, the website is not used effectively as a two-way communication channel.

The second research question - *what are the viewpoints of managers on this topic* – is answered by analyzing the questionnaires and interviews with marketing and other hotel managers. The results confirm that the features rarely appearing on websites are regarded by the managers as unimportant. For example, the majority of managers think that putting information about the weather or having virtual tours is not necessary. Indeed, the checklist has shown that very few hotel websites have these features. At the same time, very frequently appearing features such as existence of photos, contact, facilities, price and reservation information, are considered to be very important by the managers. One of the unexpected findings is that many managers believe two-way communication in the form of online feedback or question forms to be rather unimportant. Moreover, managers rarely analyse customer feedback and around half do not measure the effectiveness of their website.

Although a website is regarded as one of the most important marketing tools, the main marketing activities are done through print media, professional fairs, and cooperation with tourist agencies. Concerning distribution possibilities via a website, managers claim that online reservations are very important as they help eliminate commission fees. In order to promote online booking, incentive programs (such as discounts or free services) are created for clients.

In order to answer the third research question - *what could be done to improve the current practice* – a set of potential solutions is presented by the authors. The suggestions proposed rely

on the analysis made by the authors and inefficiencies identified as well as on possible future developments in e-commerce that could change the role of websites in the hotel industry.

We would propose that hotel managers should take more advantage of the opportunities that a good website can create to achieve better overall performance. More precisely, hotels should try to make their websites more unique, well-structured, and user-friendly, and provide links to sites containing additional information. It is also important that each hotel website should have a functioning reservation system, as well as serve as a two-way communication channel and enable clients to send feedback. Moreover, it is necessary to make alliances with other tourist organizations, which would enable mutual promotion. Furthermore, the effectiveness of website performance should be analyzed more (e.g., guest counter, customer feedback), and the necessary improvements should be made. Unfortunately, all of the above is currently employed by very few hotels.

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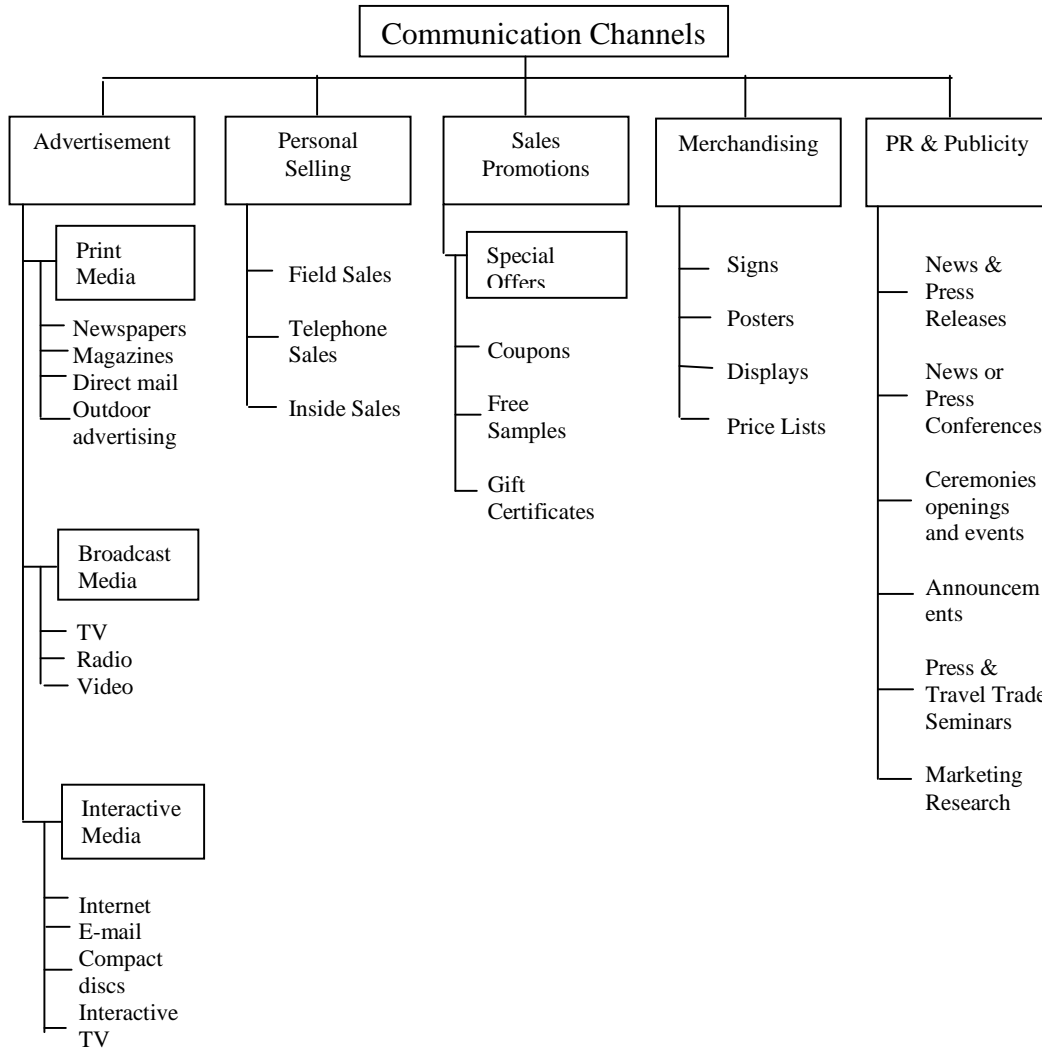
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9 Appendices

Appendix 1: Communication Channels

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                        Communication Channels

Advertisement    Personal        Sales          Merchandising    PR & Publicity
                 Selling         Promotions

  Print                            Special                          News &
  Media            Field Sales     Offers          Signs            Press
                                                                    Releases
   Newspapers                       Coupons         Posters
   Magazines      Telephone                                         News or
   Direct mail    Sales             Free            Displays        Press
   Outdoor                          Samples                         Conferences
   advertising    Inside Sales                      Price Lists
                                    Gift                            Ceremonies
                                    Certificates                    openings
  Broadcast                                                         and events
  Media
                                                                    Announcem
   TV                                                               ents
   Radio
   Video                                                            Press &
                                                                    Travel Trade
                                                                    Seminars
  Interactive
  Media                                                             Marketing
                                                                    Research
   Internet
   E-mail
   Compact
   discs
   Interactive
   TV
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Source: Morrison, Alastair M. <u>Hospitality and Travel Marketing.</u> 3rd ed. New York: Delmar, 2002. **Note:** Graph composed by the authors.

Appendix 2: The Final Checklist

Feature classification	Features
1. Company and facilities' information	- about the company
	- general description of hotel
	- hotel facilities (reception, conference halls, shops/gifts)
	- room facilities
	- dining & free time (bars, restaurants, entertainment)
2. Surrounding area information	- area short description
	- map
	- distances
	- area interests (sightseeing, shopping, corporation facilities)
	- weather
	- ways of transportation
	- restaurants & bars in the area
3. Customer contact information	- telephone
	- fax
	- e-mail
	- address
	- guest book
	- F.A.Q
4. Reservation-price information	- reservation
	- prices
	- online availability of rooms
	- online booking
	- packages / promotion (individual and group) / offers
	- cards accepted
	- for travel agencies
	- rewards programs or members special
	- prices available in different currencies
5. Management of the website	- photos
- *Multilanguage*	English
	Finnish
	Swedish
	German
	Russian

	- web designer
	- links to others
	- links to partners
	- video / virtual tour
	- audio
	- sign-in
	- downloads
	- search engines
	- last update
6. Communication	- newsletter
	- announcements
	- awards
	- press
	- questionnaire
	- feedback / claim form

*Source: Zafiropoulos, C., Vasiliki Vrana, and Dimitrios Paschaloudis. An Evaluation of the Performance of Hotel Websites using Managers' Views About Online Information Services. Greece: Technological Educational Institute of Serres, 2004. **Note:** modified by the authors.*

Appendix 3: The Questionnaire

We are conducting a survey on the websites and their function as a marketing and distribution tool in the hotel industry and would like to ask for your assistance. All the information provided below is treated as strictly confidential and will not be used for any other purpose than this research. The questionnaire will take around 10-15 minutes of your time. Thank You!!!

Part 1: General Information
First we would like to ask for the general information about your company. Please, fill in the blank spaces.

1. Your position:
2. Hotel's name:
3. Number of rooms in the hotel:
4. Number of employees:

Part 2: Creation of the website
This section contains the questions concerning the phase of creation of your website. Please indicate

1. Who participated in working out the concept of the website:
2. Were there any foreign hotel websites taken as an example? Yes / No
3. Who is your website meant to target to? (Please indicate in the rank order):

Target group:	Rank order:
- Estonian travel agencies	
- Foreign travel agencies	
- Domestic individual clients	
- Foreign individual clients	

Part 3: Regular activities
This section contains questions concerning the maintenance and the regular activities that are done on your website.

1. Is there a visitor counter on your website? Yes / No
2. How often is the website updated?
3. What sort of the updates is the most common? (Please indicate in the rank order):

Updated field:	Rank order:
- News	
- Promotion	
- Photos	
- Reservations	
- Information about hotel	

4. How do you get traffic to your website? (Please indicate in the rank order):

Traffic:	Rank order:
- Hyperlinks	
- Banners	
- Traditional advertising	
- Internet advertising	

Part 4: Results

This section contains questions on the marketing and distribution results that are provided by your hotel's website.

1. How many online reservations are received monthly?
2. Do you receive feedback from your customers via website? Yes / No / Not enough
3. How is the feedback analyzed?
4. Do you regularly analyze the performance of your website and how do you do it?
5. Do you think the investment in the development of the website has paid off? Yes / No / Not fully

Part 5: Attitudes

This section contains questions on your attitude about the hotels' website and its marketing and distribution functions.

1. How important is the website considered to be for the hotel's marketing communication?
   - ☐ Absolutely unimportant
   - ☐ Considerably unimportant
   - ☐ Neither important nor unimportant
   - ☐ Rather important
   - ☐ Very important

2. How important is the website considered to be for the hotel's sales?
   - ☐ Absolutely unimportant
   - ☐ Considerably unimportant
   - ☐ Neither important nor unimportant
   - ☐ Rather important
   - ☐ Very important

3. In your opinion, what is the main function of your hotels' website?
   - ☐ Marketing
   - ☐ Distribution
   - ☐ Other

4. How important are these attributes for a hotel website? (Please chose from scale 1-5)

Attributes	Absolutely unimportant	Considerably unimportant	Neither important nor unimportant	Rather important	Very important
History of the hotel	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
General description	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Info about facilities	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Info about the rooms	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Contact info	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
FAQ-s	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Possibility for online feedback	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Possibility for online questions	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Online reservations	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Prices	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Map	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Transportation info	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Weather	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Photos	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Virtual tours	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

5. Are you planning to radically change your website in the near future?

6. What would you like to change about your website?

Appendix 4: The Interview Guide

This guide lists the questions asked during the interviews. Although certain sequence of questions is maintained, the discussion should be left open and fairly unstructured in order to discover new aspects that the managers might tell.

Part 1: General Information
In this part general questions about the hotel and the person interviewed are asked.

1. Name of the hotel:
2. What is your name and position?
3. How old is the hotel?
4. How many rooms are there in the hotel?
5. How long have you been working for this hotel and what is your experience in the field of hospitality?

Part 2: Marketing Activities
This part contains questions on the marketing activities that are employed by the hotel management.

1. Do you have a marketing department or a person responsible for the marketing activities in your hotel?
2. How big is your marketing department and what are the main responsibilities of these people / this person?
3. How big is your marketing budget (in % in comparison to overall budget)?
4. What are the main marketing activities? What communication channels do you use to market the hotel (type of media)?
5. Do you consider hotel website to be an important tool to market your hotel's services?
6. In your opinion, what is the main function of the hotel website?

Part 3: Sales Activities
This part contains questions on the marketing activities that are employed by the hotel management.

1. How big is your sales department and what are the main responsibilities of these people / this person?
2. How large is the share of online bookings through your website of the total sales?
3. Do you offer any incentives for the customers to use you hotel's website (contests, bonus programmes, etc.)?
4. Do you consider hotel website to be an important tool to distribute your hotel's services?

Part 4: Hotel Website
This part contains question about hotel's website in regard to its creation, maintenance and evaluation of its performance.

Creation

1. When was the website of your hotel launched?
2. Who has been creating your website: do you have a special IT department doing it or are you outsourcing the specialists?
3. Who is in charge of the content of the website?
4. When creating a website, did you intend to target any specific groups by it?
5. What determines the choice of languages that are offered on your website?
6. In your opinion, what are the most important features that a hotel's website should definitely include?

Development

1. How often is your website updated?
2. What field is most frequently updated?
3. How do you market your website and make people aware of its existence (banners, special advertisements, etc.)?
4. Have you formed any alliances with other tourism companies in order to mutually promote each others websites? How is it done?

Evaluation

1. How many people visit your website (on a monthly basis)?
2. What are the most popular pages on the website?
3. Do you receive many orders online or the inquiries by e-mail? If yes, then how many (in % of overall inquiries)?
4. Do you receive feedback from your customers via website? If yes, then do you afterwards evaluate the feedback and take any steps to better fulfil your customers' expectations?
5. Can you name major strengths of your website in comparison to other hotels' websites?
6. Can you name major weaknesses of your website in comparison to other hotels' websites?
7. Do you think the investment in your website has paid off?
8. Are you planning to make any radical changes in the website of your hotel in the near future?
9. What changes about your website could you consider?

Appendix 5 – Comparison of the occurrences of features in all Estonian and separately in Tallinn websites

Feature classification	Features	Occurrence:		
		Estonia	*Tallinn*	Difference
1. Company and facilities' information	- about the company	81,89%	74,42%	-7,47%
	- general description of hotel	91,34%	95,35%	4,01%
	- hotel facilities (reception, conference halls, shops/gifts)	99,21%	100,00%	0,79%
	- room facilities	97,64%	97,67%	0,04%
	- dining & free time (bars, restaurants, entertainment)	93,70%	95,35%	1,65%
2. Surrounding area information	- area short description	76,38%	79,07%	2,69%
	- map	77,17%	86,05%	8,88%
	- distances	41,73%	67,44%	25,71%
	- area interests (sightseeing, shopping, corporation facilities)	20,47%	16,28%	-4,19%
	- weather	7,87%	11,63%	3,75%
	- ways of transportation	8,66%	11,63%	2,97%
	- restaurants & bars in the area	2,36%	2,33%	-0,04%
3. Customer contact information	- telephone	100,00%	100,00%	0,00%
	- fax	96,06%	100,00%	3,94%
	- e-mail	99,21%	100,00%	0,79%
	- address	100,00%	100,00%	0,00%
	- guest book	6,30%	11,63%	5,33%
	- F.A.Q	0,79%	2,33%	1,54%
4. Reservation-price information	- reservation	67,72%	95,35%	27,63%

	- prices	96,85%	100,00%	3,15%
	- online availability of rooms	7,09%	18,60%	11,52%
	- online booking	67,72%	95,35%	27,63%
	- packages / promotion (individual and group) / offers	54,33%	65,12%	10,79%
	- cards accepted	31,50%	53,49%	21,99%
	- for travel agencies	1,57%	4,65%	3,08%
	- rewards programs or members special	16,54%	20,93%	4,39%
	- prices available in different currencies	51,97%	72,09%	20,12%
5. Management of the website	- photos	99,21%	100,00%	0,79%
- *Language:*	English	93,70%	95,35%	1,65%
	Finnish	70,87%	76,74%	5,88%
	Swedish	9,45%	4,65%	-4,80%
	German	28,35%	27,91%	-0,44%
	Russian	59,84%	83,72%	23,88%
	- web designer	23,62%	23,26%	-0,37%
	- links to others	37,01%	44,19%	7,18%
	- links to partners	32,28%	44,19%	11,90%
	- video / virtual tour	11,81%	20,93%	9,12%
	- audio	6,30%	9,30%	3,00%
	- sign-in	1,57%	2,33%	0,75%
	- downloads	0,79%	0,00%	-0,79%
	- search engines	9,45%	16,28%	6,83%
	- last update	0,79%	0,00%	-0,79%
6. Communication	- newsletter	29,13%	41,86%	12,73%
	- announcements	37,01%	55,81%	18,81%
	- awards	3,94%	4,65%	0,71%
	- press	1,57%	0,00%	-1,57%
	- questionnaire	0,00%	0,00%	0,00%
	- feedback / claim form	18,90%	27,91%	9,01%

Source: created by authors.

Appendix 6 – Number and percentage of features observed in each individual hotel

Name of the hotel	City	Number of rooms	Webpage	N of features	% of overall features
TALLINN HOTELS:			*Average number of features:*	*22,76*	*47,4%*
Alexi	Tallinn-Nõmme	6	www.alexi.ee	22	45,8%
Athena	Viimsi	60	www.hotellathena.ee	23	47,9%
Barons	Tallinn	34	www.baronshotel.ee	20	41,7%
BWH Tallink	Tallinn	349	http://bwhotel.tallink.com/eng/index.php	24	50,0%
City Hotel Portus	Tallinn	107	www.tallinnhotels.ee	25	52,1%
Comfort Hotel Oru	Tallinn	51	www.oruhotel.ee	24	50,0%
Dorell	Tallinn	7	www.dorell.ee	17	35,4%
Dzingel	Tallinn	240	www.dzingel.ee	22	45,8%
Ecoland	Tallinn	76	www.ecoland.ee	25	52,1%
Gabriel	Tallnn	80 places	www.hotelgabriel.ee	22	45,8%
Getliin	Saku	13	www.zone.ee/hotell_getliin/	12	25,0%
G9	Tallinn	23	www.hotelg9.ee	21	43,8%
Hermes	Tallinn	37	www.hermes.ee	22	45,8%
Imperial	Tallinn	32	www.imperial.ee	25	52,1%
Kelluka	Tallinn	11	www.kelluka.ee	18	37,5%
Kolm Õde	Tallinn	23	www.threesistershotel.com	32	66,7%
Kurtna	Kurtna	14	http://hotell.kurtna.com	24	50,0%
Lembitu	Tallinn	16	www.lembituhotell.ee	14	29,2%
Lilleküla	Tallinn	31	www.lillekulahotel.ee	20	41,7%
Meriton Grand Hotel	Tallinn	164	www.grandhotel.ee	31	64,6%
Metropool	Tallinn	144	www.metropool.ee	27	56,3%
Mihkli	Tallinn	77	www.mihkli.ee	26	54,2%
Nepi Hotell	Tallinn	11	www.nepihotell.ee	19	39,6%
Nordic Hotels:	Tallinn		www.nordichotels.ee	25	52,1%
Skane		38			
L'Ermitage		46			
Old Town Maestro's	Tallinn	23	www.maestrohotel.ee	18	37,5%
Olevi	Tallinn	17	www.olevi.ee	25	52,1%
Peopleo	Laagri	53	www.peoleo.ee	16	33,3%
Pirita TOP SPA Hotell	Tallinn	267	www.topspa.ee	31	64,6%
Radisson SAS	Tallinn	280	http://tallinn.radissonsas.com	20	41,7%
Rotermanni	Tallinn	38	www.rotermanni.ee	20	41,7%
Rotermanni Viiking	Tallinn	33	www.vikinghotel.ee	19	39,6%
Sokos Hotel Viru	Tallinn	257	www.viru.ee	26	54,2%
Stroomi	Tallinn	137	www.stroomi.ee	24	50,0%
Susi	Tallinn	101	www.susi.ee	26	54,2%
Taanilinna	Tallinn	20	www.taanilinna.ee	25	52,1%
Tatari 53	Tallinn	36	www.tatari53.ee	22	45,8%
Tähetorni* (9 keelt)	Tallinn	35	www.thotell.ee	21	43,8%

Uniquestay* (7 keelt)	Tallinn	77	www.uniquestay.ee	27	56,3%
Valkla Rand	Valkla		www.valklarand.ee	13	27,1%
Vana Wiru Hotel	Tallinn	82	www.vanawiru.ee	29	60,4%
Villa Stahl	Tallinn	8	www.villastahl.ee	19	39,6%
Ülemiste	Tallinn	132	www.ylemistehotel.ee	26	54,2%
Reval Hotelgroup:	Tallinn		www.revalhotels.ee	30	62,5%
Olümpia		390			
Park		121			
Central		247			
Reval-Express		163			
Scandic Hotels Eesti:	Tallinn		www.scandic-hotels.ee	22	45,8%
Palace					
St. Barbara		86			
Rannahotell		62			
Schlössle* (awards!)	Tallinn	27	www.schlossle-hotels.com	25	52,1%
Vihterpalu mõis	Harjumaa	32	www.vihterpalu.ee	14	29,2%
Domina:	Tallinn		www.dominahotels.ee	26	54,2%
Inn City		68			
Ilmarine		150			
GO Hotel Shnelli	Tallinn	124	www.gohotels.ee	25	52,1%
Merchant House* (mitte l6petatud website) ?	Tallinn	37	www.merchantshousehotel.com	26	54,2%
TARTU HOTELS:			*Average number of features:*	*21,8*	*45,4%*
Barclay	Tartu	49	www.barclay.ee	20	41,7%
Draakon	Tartu	41	www.draakon.ee	20	41,7%
Hansa	Tartu	22	www.hansahotell.ee	21	43,8%
Hotell Tartu	Tartu	62	www.tartuhotell.ee	25	52,1%
Ihaste	Tartu	46	www.ihastehotell.ee	22	45,8%
Kantri Hotell	Tartu	27	www.kantri.ee	21	43,8%
London	Tartu	60	www.londonhotel.ee	23	47,9%
Pallas	Tartu	61	www.pallas.ee	26	54,2%
Park Hotell	Tartu	19	www.parkhotell.ee	20	41,7%
Rehe	Tartu	85	www.rehehotell.ee	20	41,7%
PÄRNUMAA HOTELS:			*Average number of features:*	*20,9*	*43,6%*
Aisa	Pärnu	30	www.aisa.ee	21	43,8%
Ammende Villa	Pärnu	24	www.ammende.ee	24	50,0%
BWH Pärnu	Pärnu	80	www.pergohotels.ee	30	62,5%
Emmi	Pärnu	32	www.emmi.ee	19	39,6%
Koidula ParkHotell	Pärnu	39	www.koidulaparkhotell.ee	22	45,8%
Legend	Pärnu	22	www.legend.ee	22	45,8%
Lepanina	Pärnu	75 places	www.lepanina.ee	13	27,1%
Seegi Maja	Pärnu	53	www.seegimaja.ee	14	29,2%
Strand*	Pärnu	187	www.strand.ee	25	52,1%
Tervise Paradiis	Pärnu	122	www.spa.ee	23	47,9%

Valli	Pärnu	33	www.valli.ee	17	35,4%
Vesiroos	Pärnu	13	www.pina.ee	19	39,6%
Victoria	Pärnu	23	www.victoriahotel.ee	23	47,9%
			-		
LÄÄNE-VIRUMAA HOTELS:			*Average number of features:*	*17,5*	*36,5%*
			-		
Palmse Parkhotell	Lahemaa	27	www.phpalmse.ee	17	35,4%
Rannaliiv	Võsu	11	www.rannaliiv.ee	16	33,3%
Sagadi mõis	Lääne-Virumaa	14	www.rmk.ee	18	37,5%
Wesenbergh	Rakvere	45	www.wesenbergh.ee	19	39,6%
			-		
IDA-VIRUMAA HOTELS:			*Average number of features:*	*21,2*	*44,1%*
			-		
Alex	Kohtla-Järve	10	www.alex.ee	23	47,9%
Etapp	Narva	19	www.hot.ee/etapp	18	37,5%
King	Narva	23	www.hotelking.ee	17	35,4%
Krunk	Sillamäe	21	www.krunk.ee	17	35,4%
Laagna	Laagne	15	www.laagna.ee	23	47,9%
Liivarand	Narva-Jõesuu		www.liivarand.ee	18	37,5%
Saka Cliff Hotel & SPA	Ida-Virumaa	33	www.saka.ee	28	58,3%
Wironia	Jõhvi	21	www.wironia.ee	18	37,5%
Hotell Inger	Narva	70	www.inger.ee	22	45,8%
NARVA	Narva	51	www.narvahotell.ee	25	52,1%
Kalvi Mõis		28	www.kalvi-hotel.com	24	50,0%
			-		
JÄRVAMAA/RAPLAMAA HOTELS:			*Average number of features:*	*18*	*37,5%*
			-		
Neli Kuningat	Paide	24	http://kodu.neti.ee/~dy003a	16	33,3%
Ruunawere	Raplamaa	16	www.ruunawere.com	20	41,7%
			-		
SAAREMAA/HIUMAA HOTELS:			*Average number of features:*	*18,1*	*37,7%*
			-		
Arabella	Kuressaare	52	www.arabella.ee	19	39,6%
Arensburg	Kuressaare	25	www.sivainvest.ee/content.asp?sid=6	24	50,0%
Daissy	Kuressaare	15	www.daissy.ee	18	37,5%
Georg Ots Spa	Kuressaare	91	www.gospa.ee	24	50,0%
Heltermaa	Hiiumaa	18	www.heltermaahotell.ee	18	37,5%
Johan	Kuressaare	22	www.saaremaa.ee/johan	17	35,4%
Kuressaare Linnahotell	Kuressaare	18	http://linnahotell.kontaktid.ee	23	47,9%
Liilia	Hiiumaa	13	www.liiliahotell.ee	17	35,4%
Lossi	Saaremaa	10	www.saaremaa.ee/housing/lossihotell	15	31,3%
Lõokese	Hiiumaa	38	www.lookese.com	22	45,8%
Merekivi	Kuressaare	51	www.tt.ee/merekivi	9	18,8%

Nasva Jahtklubi	Nasva, Saaremaa	21	www.saaremaa.ee/nasvahotel	15	31,3%
Padu	Hiiumaa	18	www.paduhotell.ee	16	33,3%
Repo	Kuressaare	14	www.saaremaa.ee/repo	18	37,5%
Saaremaa*** (ways of tr. In links)	Saaremaa	41	www.saarehotell.ee	25	52,1%
Sõnajala (all lang. +latv, lith)	Kärdla	26	www.hiiumaa.ee/sonajala	16	33,3%
Vanalinna Vöörastemaja	Kuressaare	14	www.vanalinna.ee	12	25,0%
			-		
HAAPSALU/LÄÄNEMAA HOTELS:			*Average number of features:*	*15,4*	*32,1%*
			-		
Haapsalu (+prantsuse keel)	Haapsalu	38	www.haapsaluhotel.ee	13	27,1%
Kongo	Haapsalu	21	www.kongohotel.ee	18	37,5%
Promenaadi	Haapsalu	32	www.promenaadi.ee	17	35,4%
Päeva Villa	Haapsalu	18	www.paevavilla.ee	18	37,5%
Tammiku	Haapsalu	24	www.tammiku.ee	11	22,9%
			-		
PÕLVAMAA HOTELS:			*Average number of features:*	*23*	*47,9%*
			-		
Pesa	Põlva	30	www.kagureis.ee	23	47,9%
			-		
VALGAMAA HOTELS:			*Average number of features:*	*18,9*	*39,4%*
			-		
Bernhard	Otepää	32	www.bernhard.ee	24	50,0%
Hotell de Tolly	Tõrva	11	www.hotelldetolly.ee	17	35,4%
Karupesa	Otepää	29	www.karupesa.ee	28	58,3%
Lille Hotell Otepää	Valgamaa	25	www.lillehotel.ee	13	27,1%
Metsis	Valga	18	www.hotellmetsis.com	8	16,7%
Otepää Kesklinna Hotell	Otepää	12	www.kesklinnahotell.ee	11	22,9%
Pigilinna	Tõrva	11	www.pigilinna.ee	14	29,2%
Pühajörve Puhkekeskus	Otepää	98	www.pyhajarve.com	25	52,1%
Taagepera Loss*	Valgamaa	32	www.taageperaloss.ee	30	62,5%
			-		
VILJANDIMAA HOTELS:			*Average number of features:*	*17,5*	*36,5%*
			-		
Centrum	Viljandi	27	www.centrum.ee	15	31,3%
Grand Hotel Viljandi	Viljandi	49	www.ghv.ee	20	41,7%
Oma Kodu	Viljandi	16-80 places	www.omakodu.ee	14	29,2%
Peetrimõisa Villa SPA	Viljandi	15	www.peetrimoisavilla.ee	21	43,8%
			-		
VÕRUMAA HOTELS:			*Average number of features:*	*19,5*	*40,6%*
Kubija	Võru	55	www.kubija.ee	25	52,1%
Tamula	Võru	24	www.tamula.ee	14	29,2%
			Total av. Number of features:	**20,72**	**43,2%**

Source: *created by authors.*

Appendix 7 - Questionnaire results[1]

Part 1: General Information

1. Your position:
General Manager: 13 (Tln: 1); Sales Manager: 10 (Tln: 5); Marketing Manager: 9 (Tln: 9); Sales and Marketing Manager: 4 (Tln: 2); (Marketing) Assistant: 3 (Tln: 2); Chief Administrator: 2 (Tln: 0)

Part 2: Creation of the website

1. Who participated in working out the concept of the website:
Management team: 16 (Tln: 10); Management and design/IT company: 11 (Tln: 6) ; Manager and designer: 2 (Tln: 0); Webdesign company: 1 (Tln: 0)

2. Were there any foreign hotel websites taken as an example?
Yes: 5 (Tln: 4)
No: 34 (Tln: 15)

3. Who is your website meant to target to? (Please indicate in the rank order):

Target group:	Estonia	Tallinn	Tallinn centre
- Estonian travel agencies	3.05	3.09	3.40
- Foreign travel agencies	2.96	2.88	3.03
- Domestic individual clients	2.04	2.63	2.57
- Foreign individual clients	1.97	1.70	1.32

Part 3: Regular activities

1. Is there a visitor counter on your website?
Yes: 15 (Tln: 10)
No: 26 (Tln: 9)

2. How often is the website updated?
All the time (every day if needed): 8 (Tln: 8); Depends on the need: 6 (Tln: 2); When a new offer: 2 (Tln: 0); Every week: 3 (Tln: 0); Many times a month: 3 (Tln: 0); Once a month: 10 (Tln: 6); Once in a quartal: 2 (Tln: 0); Once a year: 2 (Tln: 1)

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[1] Depending on the question type, the figures show either the number of answers given or the average of all responses in the whole sample (including Tallinn). *Tln* gives the figures for Tallinn separately.

3. What sort of the updates is the most common? (Please indicate in the rank order):

Updated field:	Estonia	Tallinn
- News	1.78	1.51
- Promotion	1.43	1.67
- Photos	3.36	3.41
- Reservations	3.94	4.09
- Information about hotel	3.17	3.38

4. How do you get traffic to your website? (Please indicate in the rank order):

Traffic:	Estonia	Tallinn
- Hyperlinks	2.37	2.61
- Banners	3.26	2.75
- Traditional advertising	1.91	1.69
- Internet advertising	2.01	2.24

Part 4: Results

1. How many online reservations are received monthly?
0%-10% (Figures vary)

2. Do you receive feedback from your customers via website?
Yes: 14 (Tln: 8)
No: 11 (Tln: 4)
Not enough: 15 (Tln: 7)

3. How is the feedback analyzed?
Not analyzed: 7 (+those who do not get feedback at all) (Tln: 1); Meetings and discussions with management and with employees: 3 (Tln: 1); Reply to the client: 3 (Tln: 3); Make statistics: 2 (Tln: 2); Make conclusions to have better results: 1 (Tln: 0); Thoroughly: 1 (Tln: 0); Try to find the roots of the problem and solve it: 1 (Tln: 0); If positive feedback, share it with employees: 1 (Tln: 0); Discuss and change smth if needed: 1 (Tln: 0); Depends on the problem: 1 (Tln: 0); The emloyee who is critizised has to make his own conclusions: 1 (Tln: 1); Take the comment into account: 1 (Tln: 1); By updating the website: 1 (Tln: 1); We are creating a system for it at the moment: 1 (Tln: 1); Try to improve: 1 (Tln: 1)

4. Do you regularly analyze the performance of your website and how do you do it?
No:20 (Tln: 8)
Yes: 21 (Tln: 11)
Nr of reservations: 6 (Tln: 4); Discuss with the management and change for better: 2 (Tln: 1); Statistics: 2 (Tln: 1); Ask from clients: 2 (Tln: 0); From *Turismiweb*, *Infoweb,* the number of monthly clicks: 1 (Tln: 0); When offers, see the increase in booking: 1 (Tln: 0); Depends on the need: 1 (Tln: 0); Number of website visitors: 1 (Tln: 0); Where the visitors click from: 1 (Tln: 0); Web-stat: 1 (Tln: 1); Special program to see where the visitors came from (country) and how

long did they stay on the website, which sections visited: 1 (Tln: 1); Test themselves (e.g. booking): 1 (Tln: 1); Keep track of number of visitors, comments, mailing list users: 1 (Tln: 1); By observing the website: 1 (Tln: 1)

5. Do you think the investment in the development of the website has paid off?
Yes: 37 (Tln: 16)
Not fully: 3 (Tln: 2)
No: 1 (Tln: 1)

Part 5: Attitudes

1. How important is the website considered to be for the hotel's marketing communication?
    ☐ Absolutely unimportant: 0
    ☐ Considerably unimportant: 1 (Tln: 0)
    ☐ Neither important nor unimportant: 2 (Tln: 0)
    ☐ Rather important: 6 (Tln: 2)
    ☐ Very important: 32 (Tln: 17)

2. How important is the website considered to be for the hotel's sales?
    ☐ Absolutely unimportant: 0
    ☐ Considerably unimportant: 1 (Tln: 0)
    ☐ Neither important nor unimportant: 1 (Tln: 0)
    ☐ Rather important: 11 (Tln: 5)
    ☐ Very important: 28 (Tln: 14)

3. In your opinion, what is the main function of your hotels' website?
    ☐ Marketing: 26 (Tln: 13)
    ☐ Distribution: 24 (Tln: 11)
    ☐ Other: 2 (Information (facts) about the hotel) (Tln: 1)

4. How important are these attributes for a hotel website? (Please chose from scale 1-5)

Attributes	Absolutely unimportant (1)		Considerably unimportant (2)		Neither important nor unimportant (3)		Rather important (4)		Very important (5)		Average score	
	All	Tln	All	Tln	All	Tln	All	Tln	All	Tln	All	Tln
History of the hotel	0	0	9	5	12	5	15	8	5	1	3.39	3.26
General description	0	0	0	0	0	0	14	6	27	13	4.66	4.68
Info about facilities	0	0	0	0	1	1	4	2	36	16	**4.85**	4.79
Info about the rooms	0	0	0	0	0	0	5	4	36	15	**4.87**	4.79

Contact info	0	0	0	0	0	0	1	0	40	19	**4.98**	**5.00**
FAQ-s	8	3	11	5	12	5	8	5	2	1	2.63	2.79
Possibility for online feedback	0	0	0	0	10	3	17	10	14	6	4.10	4.16
Possibility for online questions	1	0	3	1	7	4	16	9	14	5	3.78	3.95
Online reservations	2	0	0	0	2	0	8	2	29	17	4.51	**4.89**
Prices	1	0	0	0	2	1	4	3	34	15	4.71	4.74
Map	0	0	1	1	2	2	17	5	21	11	4.41	4.37
Transportation info	0	0	5	1	10	4	19	10	7	4	3.68	3.89
Weather	11	2	11	7	14	8	5	2	5	0	2.32	2.53
Photos	0	0	0	0	1	0	5	3	35	16	4.83	**4.84**
Virtual tours	6	2	12	8	15	6	4	2	3	1	2.65	2.58

5. Are you planning to radically change your website in the near future?

No: 27 (Tln: 10)

Yes: 13 (Tln: 8)

Changing and improving all the time: 1 (Tln: 1)

6. What would you like to change about your website?

Nothing: 8 (Tln: 0); Add photos: 6 (Tln: 3); Make it more userfriendly: 5 (Tln: 3); Structure: 4 (Tln: 3); New image/design: 5 (Tln: 3); Online booking more efficient: 3 (Tln: 3); More modern: 3 (Tln: 3); Add a visitor counter: 2 (Tln: 0); Feedback: 2 (Tln: 2); Target groups: 2 (Tln: 2); Add on-line booking: 2 (Tln: 2); Make the work more efficient/quick (adding offers): 2 (Tln: 0); Add more info: 2 (Tln: 0); Add mailing list service: 1 (Tln: 0); Add languages: 1 (Tln: 0); Add links: 1 (Tln: 0); Better contact info: 1 (Tln: 1); Questionnaire: 1 (Tln: 1); Youth-oriented: 1 (Tln: 1); More special/unique: 1 (Tln: 1); More sales oriented: 1 (Tln: 1); Virtual tours: 1 (Tln: 1)